Excel 2010 Essentials

Workbook vs. Worksheet



A "workbook" is an excel file. It can contain multiple worksheets.

	C42		• (**	f_x	20
	A			В	
1	Date		Vendor		
2		1/3	Stop &	Shop	
3		1/7	Atkins		
4		1/8	www.a	mazon.	com
5		1/9	TJ Max	x	
6		1/9	Sunoco		
7		1/9	Jiffy Lu	be	
8		1/12	Trader	Joes	
9		1/12	Target		
10		1/16	J Crew		
11		1/17	LL Bear	ı	

A worksheet is what holds the actual data and is what you'll mainly be working in.

Create a new Workbook

File Menu > New. Pick from one of the templates, or just choose "Blank Workbook", and click the "Create" button.

Workspace Overview



The **quick access toolbar** is customizable with the functions and features you use the most. To add things to it, click the little down arrow at the end or right click it and choose customize.

The **Ribbon** has different tabs for different sets of commands. Double click a tab to collapse/ expand the ribbon.

The **File Menu** brings you to "backstage view" and has open, save, print commands.

Worksheet tabs- click on the tabs or use the arrows to the left to switch between the

different worksheets in your workbook. You can click the "insert worksheet" tab to add a new worksheet. Right click for options to move, copy, etc.

View Options- Under "View" Tab



The default view is "Normal" view, which is the traditional spreadsheet view. It's a good choice if you have a lot of data. You will see page breaks as dotted lines in this view.

Your other option is called "Page Layout" and it enables you to see a print preview of your document and work on it at the same time- you see margins, headers, page breaks, etc.

Zoom- You can zoom in and out, making your data appear smaller or larger. You can use the Zoom controls under the View tab, or use the Zoom slider in the bottom right-hand corner. There are also shortcut view buttons there, too.

Row, Columns, Cells

	Workbook Views	2	oom		_
	A			_	
1	Date	Vendor	Amount		¢
2	1/3	Hop & Shop	\$	50.00	6
3	1/7	Atkins	\$	15.00	
4	1/8	www.amazon.com	•	45.00	¢
5	1/9	TJ Maxx	\$	14.00	C
6	1/9	Sunoco	\$	11.00	6
7	1/9	liffy Lube	\$	28.00	Ċ,
8	1/12	Trader Joes	\$	48.00	¢
9	1/12	Target	\$	37.00	¢
10	1/16	Crew	\$	36.00	¢
11	1/17	L Bean	\$	43.00	¢
12	1/19	Western Mass Electric	\$	19.00	1

- **Rows** go across.

- **Columns** go up and down.

Rows are numbered and columns are lettered.

 Cells are all the little boxes that contain the data. You refer to a cell by it's column-row coordinates, for example, cell "F5".

Header Row

The first row in your worksheet is your header row. Always enter this row with descriptions of what is to go in each column- name, address, town, zip, etc. This is going to help you later for sorting and mail merges.

Selecting a cell

12	Trader Joes
12	Target
	J Crew
17	LL Bean
19	Western Mass Electric
21	Verizon
24	Comcast
	Bridge Café
28	Hampshire Bookstore
28	Bertuccis
20	M-DId-

To select a cell, make sure you have a regular open cross cursor and click it. It will get a heavier border around it and the number/ letter of its row and column will be highlighted. That dark outline is called the **"selection cursor"**, and it means that whatever you type will go inside the cell you have selected.

You can move this selection cursor, and thus change the cell you're typing into, by clicking a different cell or by using the tab key to move between cells.

Typing Into a Cell

A blinking cursor shows where you are typing, and can be moved within a cell by clicking the mouse. When you want to move on to a different cell, you can Tab to the next cell or click the mouse elsewhere. Double click the cell to get back in and type.

Selecting multiple cells

- 1. Click and hold the mouse on the top left cell of the group you want to select, then, still holding, drag the mouse to highlight the group of cells you want.
- 2. When you have them all, let go.
- 3. You can also click the top left, let go, and hold down the shift key and click the bottom right. This will select all the cells in between.
- To select just a couple un-connected cells, click one, hold down the control key, and click the next.
- To select ALL the cells in a worksheet, click the upper left-hand box, where the rows and columns meet.

Selecting Columns or Rows

- To select an entire row or an entire column, place the mouse over the column letter or row number. The cursor will turn to a black arrow. Click and it will select the whole thing.
- Click, hold, and drag to select multiple columns or rows.
- As with the cells, you can click one, hold down shift, and click another to select all the columns or rows in between the two you click on.

Clearing and Deleting

Clearing: removing whatever is inside a cell, column, or row.

Deleting: gets rid of the cell, column, or row itself, and since you can't have an empty hole in your spreadsheet the other cells, rows, or columns will move to fill in the space. This is fairly straightforward with rows and columns, but if you delete cells it will ask how you want to fill in the space- if you want to shift cells over from above, below, left, right, etc.

To clear the contents of a cell or cells:

- 1. Select them.
- 2. Hit the delete or backspace key.
- You can also Right Click > Clear Contents.

To delete a cell or cells:

- 1. Select them.
- 2. Right Click > Delete.
- You can also use the Delete menu under the Home tab. Remember, when you delete cells the rest of the cells in the workspace need to shift over to fill in the space.

<u>Undo</u>

Did you make a mistake? Use the Undo function on the Quick Access Toolbar. (looks like an arrow curving backwards). This will undo your last action. Warning: it's not always available, and sometimes you might be stuck. If this happens you can always close the file without saving. You'll lose any changes you made since you last saved, but you won't be stuck with your mistake.

Right-Clicking



Resizing Rows and Columns

- 1. Place the mouse in the area that has the column letters or row numbers, but right on the line between two rows or columns. The cursor should change to a double arrow.
- 2. Click, hold, and drag to make the column larger or smaller.
- If you want the row or column to automatically resize itself to fit any text you have entered, put the cursor in the same place and just double click. This is called "**auto-fit**".

If you want to apply any of the re-sizing measures above to multiple rows or columns, select several and resize or auto-fit just one. It will apply your changes to all the ones you have selected.

Hiding

If you want to temporarily hide a row or column, select it and Right Click > Hide.

Moving Cells, Rows and Columns

- 1. Select the ones you want to move.
- 2. Move your cursor to the outer edge of your selection, and the cursor will turn to a crosshair with an arrow.
- 3. Click, hold, and drag to move your cell. If you move it to an occupied cell Excel will ask if you want to replace the cell's contents.

To move a row or a column, you select an entire row or column and drag it, as above. Do this only if you have a blank place to move it to. If you want to move it to a place in between two rows or columns that already have data, follow instructions below for cutting & pasting.

To insert a blank row or column, select the row or column below or to the right of where you want your blank one. Right click > Insert.

Cutting, Copying and Pasting

Cutting: removes a cell, column or row from its current location. **Copying:** makes a copy and hold it in memory, leaving the original where it is. **Pasting:** takes what you cut or copied and places it wherever you have your selection cursor.

To cut or copy a cell or group of cells:

- 1. Select the cells.
- 2. Home Tab > Cut or Copy. (Or Right Click > Cut or Copy)
- 3. To paste, place the cursor where you want them to go and Home Tab > Paste.

To cut/copy and paste a whole row or column:

- 1. Select the entire row or column.
- 2. Home Tab > Cut. (Or Right Click)
- 3. Select the entire row or column one spot below or to the right of where you want to place your row or column.
- 4. Home Tab > Insert Drop Down Menu > Insert Cut Cells. You can also Right Click > Insert Cut Cells. This will just shift your existing data over instead of overwriting it.

Paste Special- Located Home Tab > Paste drop-down menu > Paste Special or Right Click > Paste Special. This gives you some other options for pasting your data. You can strip out formulas and just paste values, you can "transpose" which will switch data from going up and down to across and vice versa.

Formatting

Select the cells, column, row, etc that you want to make changes to and go to Home Tab, or right click for a mini formatting panel. This is where you can make changes to how your worksheet looks- fonts, colors, borders, etc. It's also where you specify what KIND of data a cell contains- numbers, text, dates, currency, etc. so that it can format it appropriately.

Format Cells Control Panel- For more formatting options click the little arrow in the bottom right-hand corner of any ribbon group, or Right Click > Format Cells. This will give you a larger formatting window with the options below.

Number- This is where you can specify if cells or columns contain numbers, and if they do, if you want excel to format those numbers as dates, currency, etc. Once you make this

change to a selection, even if it contains blank cells, excel will automatically format whatever you type into those cells into the format you choose.

The number types you'll use most often are:

Number- just a straight number, you can choose how many decimal places you want, and how you want negative values to display.

Currency- same as above but adds a dollar sign.

Date- this gives you lots of options as to how you want your dates formatted.

Font- Pretty straightforward. Choose a font, size, italic, bold, etc.

Alignment- Here you choose where you want your text placed inside the cell. "Orientation" allows you to make it go diagonal or whatever direction you want. If you select **"wrap text"** it will cause cells that contain lots of text to automatically resize the row to display all the text.

Border- puts a border inside or outside your selection, or both. You can choose a border color from the drop-down menu.

Fill- This lets you add color or shading to your cells.

Freeze panes/splits

Sometimes you might want to look at two different areas of your spreadsheet at the same time.

One way to do this is with **Freeze Panes**, which holds the rows or columns of your choice frozen to the top or left of the window. This is mostly useful for freezing your header row, so you can see column headings no matter how far down the spreadsheet you scroll. To do this, select the entire row below the row you want to keep frozen. View Tab > Freeze Panes. Note: you must be in "normal" view mode.

Adding a **Split** gives you two sections (or four if you do both horizontal and vertical) that you can scoll independently of each other. For a horizontal split, select a row. For a vertical split, select a column. For both, select one cell. View Tab > Split.

Sorting

Sorting will put the column(s) of your choice into alphabetical or numerical order. To sort, select all the cells. Data Tab > Sort. This pops up the sort window. If you have a header row in your worksheet, check off "My data has headers". Then choose what column you want the data sorted by in the drop-down menus. To sort by more than one criteria, click "add level".

Warning: if you don't "Select All" before sorting, it may only sort one column. This will get your data all out of whack- for example a "name" column will no longer match up with their respective street addresses if only the names get sorted.

<u>Autofill</u>

There is an easy way in excel to create long numbered lists, lists of days of the week, months, dates, etc without having to type them in ad-nauseum. You fill in a few cells with the beginning of the list you want and excel will figure out the rest for you.

- 1. Make sure your cells are formatted for the appropriate number or date category (see above, formatting).
- 2. Type in three or four entries- for example if you want a simple numbered list type 1, 2, 3 in three different cells, all in a row going down.
- 3. Select all the cells you just entered.
- 4. Put the cursor in the bottom right-hand corner, exactly on the outline of the cell. It will turn to a dark + sign.
- 5. Click, hold, and drag down to highlight as many cells as you want the formula entered into. Let go. You should have your completed list entered into those cells.
- 6. If it didn't work the way you wanted, play around with the values you entered yourselfmaybe give it more cells as example, and make sure they're formatted correctly.

Formulas

Excel can automatically make calculations for you if you tell it which cells you want to add, multiply, etc. You do this by entering a "formula". The formula lives in a cell of its own, and it shows up as the calculated value. If you double click into the cell, however, you will see the actual formula and can edit it.

Cells are referred to by column/row coordinates- cell A1, B8, etc. A formula to add these two cells is A1+B8 (no spaces in formulas). To multiply, A1xB8.

To enter a formula

2 2 =B3+C3	 Type an "=" sign. Type the coordinates of the first cell you want to use. It will highlight the cell you've entered.
	3. Type a "+" or "-" or "*" or "/", whichever function you
2 2 4	want to use.
	4. Type the second coordinates.
	5. Hit enter. The formula cell will show the result.

To get back in to edit the formula you need to double click the cell. You can then type, move your cursor around inside it, etc.

To get back out of editing the formula you need to either hit return or escape. **Don't try to** get out by clicking the mouse somewhere else because:

You can select cells to include in formulas by clicking on them, rather than having to type in the coordinates. For example, if you want to enter the formula above, you can simple type "=", click cell A1, type +, and click cell B8. It will automatically enter the A1 and B8 for you.

Autosum

To add up a lot of cells the simplest thing to do is use the AutoSum feature. This takes a range of cells you select and adds them all together automatically.

	Home	Insert
\langle	Σ AutoSur	n 🔻
	😚 Recently	Used 👻
	2 5	
	7	
	4	
	3/ =SUM(<mark>D3:</mark> I	08)
	SUM(num	

1. Select a blank cell where you want the result to appear.

2. Click the autosum button in the Formulas tab (it looks kind of like a big "E").

3. Excel will guess at the cells you want to add and you'll see them highlighted. If it guessed wrong, simply select the cells you want to include (click, drag to highlight, and let go). You'll see the formula appear as "=SUM(C2:C5)" for example.

4. Hit return to exit the formula and see your result.

If things go wrong and your formula gets wacky, or you get an error message in the formula cell, just hit escape to get out of editing the formula, clear the cell, and try again.

<u>Sheets</u>

	C42	• (* <i>f</i> _x 20
	Α	В
1	Date	Vendor
2	1/3	Stop & Shop
3	1/7	Atkins
4	1/8	www.amazon.com
5	1/9	TJ Maxx
6	1/9	Sunoco
7	1/9	Jiffy Lube
8	1/12	Trader Joes
9	1/12	Target
10	1/16	J Crew
11	1/17	LL Bean

An excel workbook can contain multiple worksheets. This is useful if you have several worksheets that all relate to the same thing- why not just keep them together as one file.

You can switch between worksheets by clicking the tabs at the bottom of the window. You can also right-click on these tabs for a range of options- creating, copying, moving, etc. You can re-order the worksheets by dragging and dropping the tabs.

Hyperlinks

If you type in a web or email address Excel will automatically make it into a "hyperlink" – ie if you click on the link it will automatically open a web browser or email program and try to take you to the web address. This can be annoying for a couple reasons- it formats the link blue and underlined which may not match the rest of your sheet, and you may accidentally click the link just while working in the spreadsheet. To remove the hyperlink and revert it back to regular text you can do the following:

- If you catch the hyperlink right after it's created you will see a small autocorrect icon right by the cell. Click on it and you'll get a menu of options, one of which is to remove the link.
- If you want to permanently disable this feature, go to the File Menu > Options> Proofing > Autocorrect Options > AutoFormat as You Type and uncheck "Replace internet paths with hyperlinks".
- Select the cell (careful not to click on the link), Right Click > Edit Hyperlink > Remove Link button is on the bottom right.

Find/replace

To find a certain cell or cells, Home Tab > Find.

Find	Replace				
Find wha	it:		No Fo	rmat Set	Format •
Within:	Sheet		tch <u>c</u> ase		
Search:	By Rows	▼ Ma	tch entire cell conter	nts	
Look in:	Formulas	•			Options <<
		(Find All	Find Next	Close

• Click the Options button.

• You can choose to search the whole workbook or just the current worksheet.

• You can choose to search only for entries matching the case your enter (ie find Smith but not smith).

• You can look for entire cells only (ie find Smith but not Pete Smith).

• You can also click the replace tab if you want to make a bunch of replacements at a time - for instance you can set it to replace all occurrences of "Smith" with "Smythe".

Note: If you have cells selected when you run the find command, it will only search the selected cells, ignoring the rest of the worksheet.

Page setup

This is where you choose what you want your page to look like when printed. Page Layout Tab> Page Setup Group.

Margins: How much blank space you want left around the data. Choose Custom Margins to adjust as needed, just don't go too close to the edge of the paper or it might get cut off. **Orientation-** Landscape (horizontal) or Portrait (vertical).

Size- What size paper you plan to print on.

Scale To Fit Group- Gives you options for shrinking or enlarging your data to fit on a certain number of pages.

Sheet Options Group- The ribbon options are if you want to print gridlines and headings (row and column letters and numbers). For more options click the arrow in the bottom right-hand corner of the group. Here you can choose specific rows or columns that you want to print at the top of every page (good if you have a header row).

Again, click the little arrow in the bottom right hand corner of a group to see a full page layout window.

Printing-

File Menu > Print. You'll see a Print Preview to see what your document will look like. You'll get a little preview of what your printed file will look like. Select Print to go ahead and Print. In the Print window you have options to just print the cells you have selected, or the entire workbook.

Print Area

If you know you only want to print a specific section of your worksheet, highlight those cells and choose Page Layout Tab > Print Area > Set Print Area. Then it will only print what you have selected. You can also clear the print area here if you want to print something else.

<u>Saving</u>

File Menu > Save. This will save your work. If you haven't yet saved your workbook you should name it and choose a location for it.

File Menu> Save As. Do this if you want to create a copy of your workbook. You also have the option to change its name and save to a new location. Once you do this you will be working on the NEW version of the workbook, and the old version will remain untouched.

When saving, we recommend saving files down so that the older versions of excel can open them. In the Save window, choose .xls format (Excel 97-2003) from the Save as Type drop-down menu. The default for the new 2007 version of Excel is .xlsx, and while this is fine most of the time someone using the 2003 version of office won't be able to open it.

Create a PDF- To create a PDF of your document, choose File Menu > Save & Send> Create PDF/XPS Document.

For More Help:

Microsoft's Office Help Pages- Step-by-step instructions, videos, and courses on lots of Excel functions and features. http://office.microsoft.com/en-us/training/default.aspx

Visit training.hampshire.edu for online tips & tutorials.